Offer Examples by Partner Type

A foundational menu of “next-step” offers you can attach to the gift page — designed to feel helpful, not salesy.

How to use this resource

- Pick 1 offer that matches how you serve clients today.
- Keep it low-friction: one clear next step, optional, and respectful of time.
- Make it specific: name the deliverable, the time required, and the outcome.
- Use these as starting points — customize for your niche, pricing, and process.

The “Good Gift Offer” Formula

Use this structure to keep the offer crisp and credible:

1) The micro-outcome: What they get (a decision, clarity, a short plan).

2) The micro-commitment: How long it takes (10–30 minutes, or a 48-hour turnaround).

3) The deliverable: What you will send or do (scorecard, 1-page plan, quick review).

4) The no-pressure CTA: One action: reply, book, or submit a link.

Fill-in Offer Template (copy/paste)

Option A (short call):
“If you’d like, I can do a quick ___-minute ___. You’ll walk away with ___ (deliverable) and a clear next step for ___. No obligation — just reply ‘YES’ and I’ll send my calendar.”

Option B (async review):
“If you want, send me ___ (link/file). I’ll do a quick review and send back ___ (deliverable) within ___ hours. Use it however you want.”

Offer Menu by Partner Type

Each section gives you 3–5 starter offers. Choose ONE to start (you can always add more later).

Business Consultant / Advisor

- 10–15 min 'Revenue Friction' check: identify the #1 bottleneck slowing growth + one practical fix.
- 1-page 'Next 30 Days' action plan: 3 prioritized moves to improve throughput (people/process/tools).
- Stakeholder alignment mini-workshop (20 min): clarify goals, metrics, and who owns what.

Make it yours: Replace ___ with your specialty, your deliverable, and your preferred CTA.

Fractional COO / Integrator

- Workflow bottleneck audit (async): you send a simple process map; I return 3 fixes + a streamlined version.
- Ops scorecard (15 min): quickly rate handoffs, cycle time, and accountability — then pick the top improvement.
- 'Stop Doing' list session (20 min): cut 3 low-value activities to free up team capacity this week.

Make it yours: Replace ___ with your specialty, your deliverable, and your preferred CTA.

Fractional CRO / Sales Leader

- Pipeline health check (15 min): spot one leakage point + one quick win for conversion or speed-to-lead.
- Call review lite (async): send 1 call recording; I return a 5-bullet coaching memo.
- Follow-up system tune-up (20 min): tighten messaging + next steps to increase response rate.

Make it yours: Replace ___ with your specialty, your deliverable, and your preferred CTA.

Marketing Agency / Growth Partner

- Lead flow snapshot (async): you send website + offer; I return 5 conversion improvements + 3 copy angles.

- ‘Message-market match’ mini review (15 min): clarify who it’s for, what it solves, and what to say first.
- Landing page teardown (async): 10-minute Loom + checklist of quick fixes.

Make it yours: Replace ___ with your specialty, your deliverable, and your preferred CTA.

CPA / Accounting / CFO Services

- Cash-leak scan (15 min): identify 3 common profit drains and where to look first in your numbers.
- Pricing & margin sanity check (async): send top 3 services + costs; I return a margin improvement suggestion list.
- Quarterly readiness checklist (async): short checklist + recommended next steps for cleaner reporting.

Make it yours: Replace ___ with your specialty, your deliverable, and your preferred CTA.

Banker / Commercial Lender

- Capital readiness snapshot (15 min): clarify what lenders look for + 3 steps to strengthen the story.
- Borrowing strategy map (async): send goals; I return 2–3 funding routes + what to prepare.
- ‘Numbers that matter’ cheat sheet: the 6 metrics to track monthly to make financing easier.

Make it yours: Replace ___ with your specialty, your deliverable, and your preferred CTA.

Insurance Broker / Risk Advisor

- Risk exposure quick scan (15 min): identify 2–3 common coverage gaps for your industry.
- Claims-prevention checklist (async): send operations overview; I return a prevention checklist you can implement.
- Policy simplifier: 1-page plain-English summary of what matters most in your coverage.

Make it yours: Replace ___ with your specialty, your deliverable, and your preferred CTA.

HR / PEO / Talent Partner

- Write like you speak: clear, warm, human.

- Retention friction check (15 min): identify top causes of churn + 2 immediate fixes.
- Role clarity starter kit (async): send 3 role titles; I return a simple scorecard + responsibilities draft.
- Hiring funnel tune-up (20 min): tighten screening + interview flow to reduce bad-fit hires.

Make it yours: Replace ___ with your specialty, your deliverable, and your preferred CTA.

IT / MSP / Automation Partner

- Write like you speak: clear, warm, human.
- Tool sprawl audit (async): list your tools; I return consolidation opportunities + quick security notes.
- 'AI wins' brainstorm (15 min): pick 2 workflows to automate first and define the success metric.
- Security basics checklist: 10-point checklist to reduce risk without overcomplicating.

Make it yours: Replace ___ with your specialty, your deliverable, and your preferred CTA.

Wealth Advisor / Financial Planner

- Business-owner planning snapshot (15 min): clarify 2–3 planning gaps (tax, risk, liquidity).
- Exit readiness mini-check (async): send goals; I return a simple readiness score + next steps.
- Benefits & protections checklist: quick checklist of coverage and structures to review annually.

Make it yours: Replace ___ with your specialty, your deliverable, and your preferred CTA.

Attorney (Business / Employment / Contracts)

- Contract risk scan (async): send a standard agreement; I return red flags + suggested clauses (non-legal advice framing as review points).
- Compliance starter checklist: simple checklist of common issues to review and where they show up.
- Deal structure clarity call (15 min): clarify the 2–3 decisions that prevent expensive misunderstandings.

Make it yours: Replace ___ with your specialty, your deliverable, and your preferred CTA.

Optional Lines (from the Partner video scripts)

Use these as CTAs or closing lines (edit to match your voice):

- Keep it simple and recognizable. 'CPA.' 'Financial Advisor.' 'Managing Partner.' 'Senior Consultant.'
- Then use the Preview button at the top to see exactly what your clients will see.
- Then hit Preview to see it live. Read it like you're a skeptical client. Does it sound like YOU? Does it make you want to keep reading?
- The offer heading should connect YOUR services to the value you just demonstrated by sharing this resource.
- Notice: These aren't about AI. They're about what YOU do. The gift proved you pay attention to their business. Now offer YOUR service.
- The offer body is where you explain what they get and why it matters. Two to three sentences. Be specific.

Offer Guardrails (keep it effective)

- Avoid stacking multiple offers in one message — it lowers response.
- Avoid heavy prep work for the recipient. If you need inputs, keep them simple (one link, one file, one screenshot).
- Avoid aggressive urgency. Use gentle timelines like “this week” or “when you’re ready.”
- If you have a paid service, you can reference it softly: “If you want help implementing, we can talk.”